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**LOS ANGELES AIR FORCE BASE  
SAMS INITIATIVE REQUEST FOR PROPOSALS (RFP)  
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## **INTRODUCTION**

The process of selecting a developer for the SAMS project consists of three distinct phases. In Phase I, the Air Force intends to select no more than five fully qualified developers who demonstrate the highest probability of success. Phase II of the selection process constitutes a Business Proposal to the Air Force for the actual execution of the project. Phase III consists of resolution of the project's administrative details and the closing. Please review **Appendix D**, Source Selection Process, for detailed information.

## **SAMS PROJECT - STATEMENT OF OBJECTIVES**

The objective of the SAMS project is to exchange up to 57 acres of LAAFB real property for a approximately 580,000 sq ft of quality office space, with absolute minimal cost to and investment by the Air Force.

To assist Offerors in preparing proposals, and to facilitate understanding of the SAMS project, the following Statement of Objectives is provided below. Detailed performance requirements of the project are defined in Appendix A.

- Provide facilities for missions currently located on Area A and the Lawndale Annex
- Provide our people safe, excellent, smart facilities with low Operations and Maintenance costs in compliance with specifications resulting in the following capabilities and characteristics while maintaining SMC corporate integrity:
  - Seismic and life safety-secure facilities
  - Maximize facility flexibility (“team friendly” open office layout)
  - Quality environment including maximizing natural light and air circulation
  - Maximize green areas, landscaping and open areas
  - Integrate pedestrian areas, plazas, & exterior appurtenances with facilities
  - Environmentally responsible
  - Pre-wired for state of the art communications
  - Minimize ground footprint of new facilities while minimizing cost of construction
  - Provide adequate parking and maximize traffic flow
  - Incorporate force protection/anti-terrorism design into all facility elements
  - Provide flexible workspace that facilitates future growth and changes
- Consolidate Los Angeles AFB to reduce operating costs, including, but not limited to:
  - Reduce overall cost of real property maintenance
  - Minimize cost of infrastructure while maximizing performance, service and quality requirements
  - Minimize external facility maintenance requirements while maximizing performance, service, and quality requirements
  - Maximize roof utility, minimize roof replacement

## **SAMS PROJECT ALTERNATIVE APPROACHES/DELETIVE ITEMS**

The financial feasibility of the overall project is the Air Force's primary concern. To allow for the greatest equity in the land exchange the Air Force is willing to entertain the following alternative approaches and deletive items that will enhance this purpose. (This is not an all inclusive list and is not intended to restrict areas for developers to creatively consider and propose.)

### ***Leases***

The Air Force's preference is to convey properties (Area A, Lawndale Annex and Sun Valley) and obtain replacement facilities at no additional cost above fair market value of real property to be conveyed rather than leasing back any new facilities. However, subject to the limitations specified in Public Law 106-398, Defense Authorization Act for FY 2001, Sec. 2861, the Air Force is willing to consider a leaseback of the new facilities to the Air Force for any period up to ten years.

### ***Lawndale Annex***

In order to enhance the value of the real property to be exchanged, the Air Force will consider proposals that require the Air Force to vacate building 80 (bldg 80) in advance of occupying replacement facilities. In the event the Air Force was to vacate the building early, it would require a minimum of 120 days notice. However, if the developer believes there are advantages to the Air Force retaining title, the Air Force is willing to consider retaining the property until such time as deemed mutually beneficial to both parties.

### ***Sun Valley***

The Air Force will consider conveying the Sun Valley property immediately upon signing a contract of sale by the parties. However, if the developer believes there are advantages to the Air Force retaining title, the Air Force will consider retaining the property until such time as deemed mutually beneficial to both parties.

### ***Area A***

The Air Force will consider allowing commercial development of portions of Area A prior to completion of the replacement facilities provided current missions can be accommodated.

### ***Alternate Sites***

Replacement facilities not located on Area B will be considered, however corporate integrity with the Aerospace Corporation and support facilities on Area B is important to the Air Force. The cost advantage to the Air Force of such an exchange must be significant to offset the loss of corporate integrity.

### ***Area B***

The developer may propose siting options in Area B that deviate from those provided in Appendix A.

**Scenario #1.** In the Air Force developed siting plan, the Air Force assumes the child development center (buildings 207 & 208), Base supply (building 240), and the AAFES gas station (building 235) will be demolished by the SAMS developer. The Air Force will favorably con-

sider siting option alternatives that will absolutely minimize Air Force investment in the land exchange by eliminating the need to demolish and/or replace these facilities.

Scenario # 2. Developers are encouraged to propose project siting options that add value to the project. As such the Air Force is willing to entertain demolishing building 219 earlier than scheduled. However, this could require Air Force functions to be relocated to temporary space (such as GSA leased offices) until replacement facilities are available (if not by the SAMS project, then by a future military construction project). Benefits of such a proposal must be sufficient to offset lease, moving or other costs incurred by the Air Force. Also, a MILCON project that will replace Building 219 may be accelerated to fiscal year 2002. Should this occur the Air Force will be willing to accept construction phasing options that add value to the land exchange.

### ***GSA Contracts***

If advantageous to the developer the Air Force will facilitate for the developer the purchasing of systems furniture under a GSA contract. Under such an arrangement the systems furniture will be considered developer provided furniture. The Air Force considers the systems furniture an integral component of the facility with preference for a turnkey project (i.e. even if the Air Force facilitates the use of a GSA contract we want the developer to manage the delivery and installation)

### ***Parking Alternatives***

The maximization of surface parking versus parking in a structure may be better for both cost and esthetic reasons. As such, the Air Force will favorably view the acquisition of land adjacent to Area B to offset the size of the parking structure as it mitigates cost and enhances esthetics.

### ***RV Storage Lot Requirement***

The SAMS project requires construction of an RV storage lot at Los Alamitos Army Air Field, which is approximately 25 miles south east of Los Angeles AFB. The lot will require paving, a perimeter chain link fencing (minimum 6 feet with 2-foot razor wire extensions), striping of pavement, and area lighting. Sites at Los Alamitos are generally level but unimproved. Construction of the lot will require a minimum amount of grading prior to the addition of base course and asphalt paving. The Air Force may adopt this construction alternative, modify the scope to fit a budget amount, or delete the requirement. The current book value of the Non-Appropriated Fund activities (Fam-Camp & RV Storage) is approximately \$150,000. The Air Force desires an RV storage lot of equal size to the existing lot (approximately 18,000 square yards) or the maximum size that can be constructed for \$150,000.

### ***Additive/Deletive Items***

The Air Force's goal is to acquire SAMS in a turnkey condition. However, should sufficient equity not exist in the land exchange or other incentives, the Air Force will consider providing funding or withdrawing certain items from the project. This section lists several potential additive/deletive items included in the SAMS project to be priced by the developer. The developer is also encouraged to provide further deletive options and value engineering proposal as necessary to ensure that there will be no cost to the government.

## **1. Value Engineer Communication Pre-Wiring.**

Use CAT V through facility, only fiber optics where specified in Appendix A

## **2. Delete Softball Field.**

As a bid base item, the developer should plan on constructing a softball field on Area B to replace the existing field at the Lawndale Annex. The field will include chain link fencing, back-stop, and automatic sprinkler system for the outfield. In addition, it is highly desirable to have a softball field available to the Air Force at all times through out the project. At a minimum the Air Force should be provided with a replacement field within six months of losing access to the field at the Lawndale Annex. Deletive #2 represents the cost savings for the developer of not including this item, with the Air Force utilizing city or county facilities.

## **3. Delete Pre-Engineered Metal Warehouse.**

The Air Force will consider deleting the requirement for a pre-Engineered Metal Building.

## **4. Delete Raised Floor in Work Areas.**

Rather than including the specified raised floor in the Appendix A, the developer will provide flooring systems found in comparable Class 'A' office properties.

## **5. Reduce SCIF space by 18,000SF.**

The Air Force will consider reducing the amount of SCIF space by 18,000SF.

Deleted items 6 - Club Ballroom, 7 - Reduce Conference Space 5,000 SF, and 8 - Reduce Conference Space an additional 5,000 SF and renumbered.

## **6. Value Engineer Building Systems.**

The Air Force will consider the cost savings from the value engineering of building systems and finishes such as HVAC, elevators, landscaping, tenant interiors, lobbies, etc. listed in Appendix A. The developer is expected to use creativity and innovative approaches to maximize the cost savings from this approach. The developer will list and describe in detail several options for such cost savings, and the Air Force reserves the right to select all, some, or none of these options for the final proposal.

## **7. Systems Furniture.**

The Air Force will consider deleting the requirement for systems furniture from the developer's scope of work

## **8. Communications Switch.**

The Air Force will consider deleting the requirement for a communications switch. Be advised that local municipalities are pursuing grants for this item.

### **9. Exterior Communications Plant.**

The Air Force will consider deleting the requirement for an exterior communications plant. Be advised that local municipalities are pursuing grants for this item.

### **10, 11. AAFES Service Station Alternatives.**

As currently envisioned the LAAFB gas station is in the footprint of the proposed parking structure. The developer may consider reconfiguring the SAMS facilities to accommodate the gas station in its current location or demolish it and/or replace it. In the proposal process the Air Force is requesting pricing data to cover the options of a) demolishing the current gas station without replacing it (*additive/deletive #14*), b) adapting the siting of the SAMS Complex to accommodate the gas station in its current location (*No deletive—base bid item*), and c) demolish and replace the gas station on Area B (*additive/deletive #13*). The Air Force will use pricing data provided from the developer to make a decision. Option a) is the least desirable and option c) is the most desirable by the Air Force. However, the financial feasibility of the overall project is the Air Force's primary concern.

## **SAMS PROJECT SCHEDULE**

Phase I proposals must be submitted by the date specified in Appendix B, Basic Instructions to Offerors, Instructions for Proposal Information and Notices to Offerors. (Phase II proposals will be requested from selected Offerors at the conclusion of Phase I.)

In preparing said proposal, the Offeror is advised that the performance period specified for completion of the SAMS project is as follows:

- The required performance period for this project is completion of the new facilities in no more than 38 months (from the effective date of the Purchase and Sale Contract).
- The Offeror is required to organize the construction and demolition requirements associated with this project and coordinate it with the Air Force, in order to provide minimum disruption to all Air Force employees.

## **STATUTORY REQUIREMENTS FOR GOVERNMENT TRANSACTIONS**

Government transactions are subject to statutes in addition to those applicable to non-Government ventures, including but not limited to the following:

### **STATUTE TITLE**

18 USC 874 and 40 USC 276c Copeland Act

41 USC 423 Procurement Integrity

31 USC 1352 Payments to Influence Certain Transactions

40 USC 327 et seq. Contract Work Hour and Safety Requirements Act

40 USC 276a et seq. Davis Bacon Act

41 USC 10b Buy American Act – Construction

41 USC 601 et seq. Contract Disputes Act

10 USC 2692 Storage and Disposal of Toxic and Hazardous Material

## **BUSINESS ARRANGEMENTS:**

**Legal Instruments:** The Air Force foresees the requirement for the execution of a number of documents, including but not limited to a Business Points Memorandum and a Purchase and Sale Contract. The official legal instruments will be written after the final agreement has been negotiated.

**Timing for the Execution of the Legal Instruments:** The Air Force will not enter into the Purchase and Sale Contract unless and until the Air Force has been given satisfactory evidence that the Selected Offeror has satisfied all of the conditions necessary for closing, established a firm closing date for its construction financing, and entered into a legally binding agreement for permanent financing.

## **PHASE I - SUBMITTAL REQUIREMENTS**

### **INTRODUCTION**

Offerors shall submit all proposal information in each of the volumes defined below. The proposal shall be broken out and submitted in volumes as follows:

VOLUME	VOLUME TITLE	PAPER COPIES (in addition to electronic version)	PAGE LIMIT
I	Executive Summary	Original plus 1	5
II	Past Performance	Original plus 1	20
III	Project Concept	Original plus 1	15
IV	Financial Strategy	Original plus 1	20
V	<u>Phase II Draft RFP Comments</u> <b><u>– NON-EVALUATED</u></b>	Original plus 1	Unlimited

#### 1) **VOLUME I - EXECUTIVE SUMMARY**

Offerors will provide an Executive Summary of their Phase I proposal, and include information regarding the items below:

- a) Describe the Offeror and any teaming partners related to the SAMS project including the business/legal relationship(s). At a minimum discuss the following:
  - i) Participating firms/companies/organizations in terms of the roles, responsibilities, authorities and legal relationship of each to the team. In addition, please differentiate between the Offeror and team members.
  - ii) The company or development/management team with which the Air Force would enter into an agreement for the development, construction, ownership, operation and/or management of the proposed project.
  - iii) The size of staff and length of operation as a company, and provide a brief historical profile, for each organization comprising the team.
  - iv) Identify the individuals who will play a significant role in the proposed project, including those responsible for negotiating and executing agreements. Also, include consultants who will participate as members of the team.
- b) Discuss how Offeror's proposal will meet or exceed SAMS Project requirements.
- c) Describe the means in terms of equity, debt and land monetization that will fund the SAMS Project requirements.

#### 2) **VOLUME II - PAST PERFORMANCE**

- a) Minimum Requirements. Describe a minimum of two projects, individual or phased development, completed within the last five (5) years, where the Offeror served as the pri-

mary developer. The two projects may consist of any combination of the following elements:

- 1) 500,000 SF of a mixed use development to include a phased development project; or
- 2) 500,000 SF of development of which 250,000 SF of which is office space; or
- 3) A re-use or re-development of an existing project meeting the above specified requirements.

Greater relevance will be given to a project consisting of mid-rise office buildings in a campus environment.

- b) Teaming Information. Provide teaming information regarding the above referenced past projects including designation of the prime contractor and the organizational structure related to management of the projects. A higher confidence rating is likely when past projects are comprised of the same teaming partners/**members** proposed for this project.
- c) Project Performance Parameters. In table format, show project, contract type, proposed and actual project cost at delivery/completion, proposed and actual delivery schedule.
  - i) Project Descriptions. Discuss dates, locations, development concepts, land uses, sizes, construction costs, roles of participants and the like. The inclusion of photographs is encouraged.
  - ii) Contract Type. Describe the contract type (fixed price, cost plus or some other type) or legal agreement related to cost.
  - iii) Cost Narrative.
    - (1) Discuss in detail the reasons for the differences between proposed and actual cost at delivery/completion, if any. Delineate between customer-requested changes and those under contractor control. Discuss how project was financed, the amount financed, name the lending institutions, and identify alternate forms of financing (including public support).
    - (2) **Provide credit references to demonstrate financial capacity for capital access, such as debt, equity. Discuss and describe the credit facilities associated with these projects. In addition, list the general guarantees/support, construction completion guarantees/support and credit support mechanisms for such credit facilities.**
  - iv) Schedule narrative. Discuss in detail the reasons for the differences between project proposed and actual schedule, if any. Discuss project management, how sub-contractors were managed, delineate between customer-requested changes and

those under contractor control, differing site conditions, architect/engineer roles and responsibilities, or other significant factors.

- d) Finished Facility Customer Assessment: Provide facility-owner/user points of contact (name, role, phone numbers) the Air Force can contact to validate the quality of the finished facility – overall customer satisfaction, quality of construction, maintainability, operating efficiencies, functionality of facility design, warranty issues, etc. Include as a minimum, someone responsible for the building phase as well as someone currently in facility management.
- e) Public Activity/City Relations. Provide local city government points of contact (name, role, phone numbers) the Air Force can contact to discuss the quality of the reputation and standing the developer/team has with the city in which the project was constructed.

Offerors may submit more than two projects. A developer demonstrating the same level of past performance as other developers but over a greater number of projects will be given greater consideration.

### 3) VOLUME III – PRELIMINARY SAMS PROJECT CONCEPT

Project Concept information shall be specific and complete. Proposals must be legible, clear and coherent. In this volume, address your proposed approach to meeting the requirements of each Subfactor, as well as the risks of your proposed performance in terms of project concept, performance, cost, and/or schedule and risk mitigation plans. Offerors are encouraged to submit innovations and/or enhancements that will add value to the project even though they are not identified herein as a basic requirement or desire. Any such innovation/enhancement will be subject to review and approval as to its merits.

- a) Project Siting and Design approach. Describe the overall concept for development and the approach to the project footprint, anticipated on "Area B" or on an alternative site, including architectural theme, and operations and maintenance of the proposed facilities in sufficient detail to demonstrate the extent, character and quality of the design envisioned.
- b) SMC Corporate Integrity. Describe how the project promotes integrated SMC and LAAFB mission activities and operations to include easy access and use of the Aerospace Corporation, the base clinic, fitness center, and other support functions for all LAAFB personnel.

If the new facilities are not located near the existing facilities, describe your approach to SMC Corporate Integrity.

### 4) VOLUME IV – FINANCIAL STRATEGY

- a) Financial Strength. Provide sufficient financial information to establish the net worth and/or liquid assets available to the company or development/management team for this project. This information shall be in the form of: 1) if a public company, provide an in-

dependently audited and certified financial statements for the last three (3) years or if a private interest, or other entity provide audited and certified financial statements and a balance sheet certified by the company's chief financial officer (CFO) for the last three (3) years showing assets and liabilities, including contingent liabilities itemized in accordance with generally accepted accounting principles, together with applicable notes; or 2) if a newly formed development entity or partnership provide balance sheets for the last three (3) years of all companies forming the newly formed entity or partnership certified by the individual company's CFO, (less than 3 years old), other evidence of financial strength and capacity.

The Air Force expects each Offeror to be able to fund the SAMS project fully out of its own resources (equity and debt) combined with any local government financial participation. Offerors must demonstrate sufficient financial strength to enable them to construct and complete the project. An Offeror must demonstrate that the project can be financed fully out of its own resources and creditworthiness without allocating risk to the Air Force.

Financial information must be submitted for the proposing investor and/or developer if such entities are different and for any parent or holding company of the proposing investor/developer. Identify appropriate references (name, title, address, telephone, fax and e-mail of financial references).

- b) Preliminary Project Financial Plan. Provide a preliminary project financial plan, to include a statement of sources and uses of funds in the requested format (See **Appendix C – Formats for Financial Proposal, for Phase I**). Offerors must demonstrate ability to raise sufficient private sources of funds to complete the proposed transaction, including if required, leasehold financing supported by a lease with the Air Force for the new Air Force buildings constructed by the developer. A lease can not exceed a ten (10) year term. Offerors also must demonstrate ability to raise sufficient private sources of funds if required for the project or in the event no local government financial participation is secured. Provide preliminary term sheets and financing commitment letters for both equity (if appropriate) and debt that fully describe the project financing as well as credit support, risk mitigation, and recourse arrangements (these documents are exempt from page count limitations). These financing and commitment letters must contain a statement by the provider that they are highly confident that the Offeror as well as the project are financially based on the submitted Preliminary Project Financial Plan and the RFP with attachments. Offerors must justify basic assumptions with market comparables, rates, and/or other appropriate data. Such data to include the cost of capital, debt and particular attention to the economics and timing of the land parcel(s) monetization. In addition, Offerors are instructed to identify and describe all applicable tax issues associated with their respective proposals, including an economic impact assessment of such issues. Include if necessary a description of the nature and extent of Air Force participation expected.

Also, describe the methodology used to calculate the estimated amount and type of private developments that can be supported on the Air Force-conveyed land, given the availability of local government funding, rezoning, and other project parameters. The

project is dependant on the value derived from the land parcels and therefore a detailed presentation of underlying value, timing of conveyance for sale, the rezoning process for extracting value, and all other relevant issues is required. Accordingly, Offerors will fully document their interactions with local government authorities (such documents are exempt from page count limitations and fully describe such matters as they relate to their proposal and the value proposition to the Air Force. This information will be used to evaluate the proposal risk associated with obtaining project financing and the feasibility of the amount and type of private developments proposed for construction on the Air Force-conveyed land.

5) VOLUME V – PHASE II DRAFT REQUEST FOR PROPOSAL (RFP) COMMENTS – NOT FOR PROPOSAL RATING EVALUATION

To help ensure success of the project and to eliminate any unnecessary barriers to creativity, the Air Force requests Offerors' review of the Draft Phase II portion of this solicitation. In this Volume, which will not be part of your overall rating, please provide any questions, comments and concerns that the Air Force should consider before formally issuing the Phase II RFP.

The Air Force reserves the right to accept or to reject the Offeror's comments regarding the document in part or in whole.

## **PHASE I – SELECTION PROCESS**

### **Basis for Phase I Selection**

The Air Force intends to select those Offerors with the highest probability of success based upon an integrated assessment of the evaluation factors provided below. These selected Offerors will then to enter the Phase II competition. This process for selection will be conducted in accordance with the process delineated in Appendix D. Selection of those Offerors who will enter the Phase II competition will be made from those deemed responsible, whose proposal conforms to the solicitation's requirements (to include all stated terms, conditions, and all other information required by this solicitation), and who are judged, based on the evaluation factors and subfactors, to represent the highest probability of success. The Air Force seeks to select those Offerors who give the Air Force the greatest confidence that they will best meet or exceed the requirements affordably. This may result in the selection of a higher rated, higher priced Offeror, where the decision is consistent with the evaluation factors, and the Source Selection Authority (SSA) reasonably determines that the superiority of the project concept and/or overall business approach and/or superior past performance of the higher price Offeror outweighs the cost difference. To arrive at a source selection decision, the SSA will integrate the source selection team's evaluations of the evaluation factors and subfactors (described below). While the Air Force source selection evaluation team and the SSA will strive for maximum objectivity, the source selection process, by its nature, is subjective and, therefore, professional judgment is implicit throughout the entire process. The Air Force reserves the right to cancel this solicitation at any time and make no down selection whatsoever.

### **Rejection of Unrealistic Offers**

The Air Force may reject any proposal that is evaluated to be unrealistic in terms of program commitments, including contract terms and conditions, or unrealistically high or low in cost when compared to Air Force estimates, such that the proposal is deemed to reflect an inherent lack of competence or failure to comprehend the complexity and risks of the project.

### **Correction Potential of Proposals**

The Air Force will consider, throughout the evaluation, the "correction potential" of any deficiency or proposal inadequacy. The judgment of such "correction potential" is within the sole discretion of the Air Force. If an aspect of an Offeror's proposal not meeting the Air Force's requirements is not considered correctable, the Offeror may be eliminated.

## **PHASE I - EVALUATION FACTORS**

### **INTRODUCTION**

a) **Evaluation Factors, Subfactors and Relative Order of Importance**

Past Performance is the most important factor. Within Factor 1, subfactors are of equal importance. Within Factor 2, the subfactor 1 is most important and subfactors 2-4 are individually of lesser importance to subfactor 1, but of equal importance to each other.

b) **Factor 1: Past Performance**

- i) SUBFACTOR 1 – Public Activity/City Relations
- ii) SUBFACTOR 2 – Finished Facility Customer Assessment
- iii) SUBFACTOR 3 - Cost Performance
- iv) SUBFACTOR 4 - Schedule

c) **Factor 2: Preliminary Project Concept**

- i) SUBFACTOR 1 - Financial Strategy
- ii) SUBFACTOR 2 - Project Siting and Design Approach
- iii) SUBFACTOR 3 – SMC Corporate Integrity
- iv) SUBFACTOR 4 – Proposal Risk Assessment

### **1) FACTOR 1 – PAST PERFORMANCE**

Past Performance is the most important factor in Phase I.

The past performance evaluation will assess the confidence in the Offeror's ability (which includes, if applicable, the extent of its subcontractors, teaming partners involved), to successfully accomplish the proposed project based on the Offeror's demonstrated relevant past and present work record. The currency and relevance of the information, source of the information, context of the data, and general trends in the contractor's performance will be considered. The Air Force may consider as relevant, efforts performed for agencies of the federal, state, or local governments and commercial customers. The Air Force will make an independent determination of relevancy of the past and present performance data provided or obtained.

The Air Force will accomplish the Past Performance evaluation by focusing on performance that is relevant to the SAMS project. The information evaluated may include data on efforts performed by other divisions, critical subcontractors, or teaming contractors, if such resources will be brought to bear or significantly influence the performance of the proposed effort. As a result of the favorable and unfavorable information (strengths and risks) identified, the Air Force will make a performance confidence assessment. This performance confidence assessment will result in ratings of High Confidence, Significant Confidence, Confidence, or Little Confidence. Appendix D, Source Selection Process, describes the past performance evaluation process and rating definitions.

Where performance records indicate problems, the Air Force will consider the number and severity of the problems and the appropriateness and effectiveness of any corrective actions taken (not just planned or promised). The Air Force may review more recent contracts or performance evaluations to ensure corrective actions have been implemented and to evaluate their effectiveness. Offerors will have the opportunity to address any negative or adverse past performance information received by the Air Force during this evaluation for which they have not had an opportunity to address in the past.

Following are the key requirements the Air Force will use to evaluate past performance:

a) Offeror describes projects that meet the specific criteria in the past performance submittal requirements.

- Higher confidence will be given to past projects comprised of the same teaming partners proposed for this project.
- Greater relevance will be given to 500,000 SF mid-rise office buildings in a campus environment.
- Higher confidence will be given to a developer demonstrating the same level of past performance as other developers but over a greater number of projects.

b) SUBFACTOR 1 Public Activity And City Relations. The Air Force will evaluate the degree to which local Governments are satisfied with developer's performance regarding completed project.

c) SUBFACTOR 2 Finished Facility Customer Assessment. The Air Force will evaluate the degree to which customer (both building phase and current facility management) is satisfied with developer's contractual performance regarding completed project.

d) SUBFACTOR 3 Cost Performance. The requirement is met when

- (1) Either the completed facility cost is not more than 105% of the proposed cost or the deviation has a satisfactory explanation.
- (2) Offeror demonstrates that it has successfully accessed capital and debt for projects.

e) SUBFACTOR 4 Schedule. The requirement is met when either (1) actual completion date is equal to or less than proposed schedule completion date or (2) the deviation has a satisfactory explanation.

## 2) FACTOR 2 – PRELIMINARY PROJECT CONCEPT

a) Each subfactor will be evaluated against the following basic assessment criteria (equal in importance):

*Soundness of approach:* The Offeror's proposal will be assessed in terms of the degree to which the proposal, relating to particular items, is logical, defensible, and consistent with all other parts of the proposal. Additionally, the proposal will be assessed as to whether or not all assertions made by the Offeror are supported and thoroughly documented, assumptions are clearly labeled and justified and the proposal assumptions are consistent with current market conditions. Finally, the proposal will be assessed as to whether it provides an effective and efficient method of performing the work.

*Understanding the requirement:* The Offeror's proposal will be assessed in terms of the degree to which the Offeror understands the requirements relating to a particular item, as evidenced through compliance with the requirements of the solicitation. The proposal must indicate concise, complete, responses, which are clearly cross-referenced or indexed with the solicitation.

b) SUBFACTOR 1 – FINANCIAL STRATEGY

- Financial Strength The requirement is met when the Offeror demonstrates:
  - Satisfactory evidence that the company or development/management team possesses the financial strength, capability and capacity to carry out the project, as currently envisioned. (The Offeror is financible.)
  - Financial projections are fully justified and supported and are considered fair under current market conditions.
  - Long-term commitment to the project (for example the specific amount, type, source, and timing of equity).
- Preliminary Project Financial Plan. The requirement is met when the Offeror demonstrates:
  - Absolute minimal cost to the Air Force.
  - The reasonableness of the projections.
  - The sources and amounts of funding can be secured. (The project is financible.)
  - The assumptions, timing, and preliminary estimates on which strategy is based are clearly identified and consistent with current market conditions.
  - A commercially reasonable and documented approach to local government and tax matters.

c) SUBFACTOR 2 – Project Siting And Design Approach.

The requirement is met when the project concept effectively demonstrates that it meets the intent of Appendix A to include project foot print, architectural theme, maintainability and that the concept is responsive to SAMS project statement of objectives. The Air Force reserves the right to evaluate and give evaluation credit for proposed features that exceed the stated requirements.

d) SUBFACTOR 3 - SMC Corporate Integrity

The requirement is met when the project concept effectively promotes integrated SMC and LAAFB mission activities and operations to include easy access and use of the Aerospace Corporation, the base clinic, fitness center, and other support functions for all LAAFB personnel.

e) SUBFACTOR 4 – PROPOSAL RISK ASSESMENT

The proposal risk assessment focuses on the risks and weaknesses associated with an Offeror's proposed approach at the Factor 2 level. This part of the evaluation includes an assessment of the potential for disruption of schedule, increased cost, degradation of performance, and the need for increased Air Force oversight, as well as the likelihood of achievement of or unsuccessful contract performance. For each identified risk, the assessment also addresses the Offeror's proposal for mitigating the risk and why that approach is or is not manageable.

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**PHASE II – SUBMITTAL REQUIREMENTS**

**INTRODUCTION**

Submit all information, descriptions, data, and drawings in sufficient detail to allow the Air Force to determine the degree of compliance with the building design and construction requirements. Offerors are encouraged to submit innovations and/or enhancements that will add value to the project even though they are not identified herein as a basic requirement or desire. Any such innovation/enhancement will be subject to review and approval as to its merits.

**ORGANIZATION**

Offerors shall submit all proposal information in each of the volumes defined below. The proposal shall be broken out and submitted in volumes as follows:

**VOLUME DESCRIPTION NUMBER OF SUBMITTALS PAGE LIMIT**

VOLUME	VOLUME TITLE	PAPER COPIES (in addition to electronic version)	PAGE LIMIT
I	Executive Summary	Original plus 1	5*
II	Financial and Cost Proposal	Original plus 1	15#
III	Facility Capability	Original plus 1	40**
IV	Project Management	Original plus 1	30
V	Past Performance	Original plus 1	Replacement pages only

*\*Excludes comments to business arrangements/legal documents.*

*\*\* Excludes renderings, drawing, pictures, etc.*

*# Excludes mandatory forms.*

**RISK MANAGEMENT**

In Volumes 2 through 4, include a specific chapter on risk. Information within this chapter should address 1) processes for the identification and mitigation of risk throughout the project and 2) specific risks associated with the Offeror's project and mitigation plan associated with same. As a minimum risk consideration should address significant technical, cost and schedule risks associated with your proposal including probability of occurrence and project impact. Account for all cost and schedule drivers.

1) **VOLUME 1 EXECUTIVE SUMMARY**

a) **Overview**. Provide an overview of Phase II.

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b) Changes to Teaming Partners. Describe any changes from the Phase I proposal related to the developer and any teaming partners associated with the project, including the business/legal relationship.

c) Project Requirements. Identify the way in which the developer/team will meet or exceed SAMS project requirements.

d) Exceptions to Anticipated Legal Documents. Provide written comments in the form of marked up Air Force sample legal instruments from the appendices with comments to clarify their revisions as necessary (see **Appendix E** – Anticipated Legal Agreements where applicable). In particular, identify areas (if any), other than items required by law that are barriers to obtaining the optimum business deal. The Air Force reserves the right to accept and/or to reject the Offeror's comments with regards to the document in part or in whole.

2) VOLUME II – FINANCIAL AND COST PROPOSAL (Reference the **Appendix C** for mandatory forms).

Submit proforma financial information for the duration of the proposed project to include but not limited to a balance sheet for the term of the agreement, income statement, sources and uses of cash, and a narrative with assumptions, terms, conditions, contingencies, and basis for calculations. Submit supporting data to include but not limited to:

a) Revenue and Expenditure Budget. Include an operating Revenue and Expenditure Budget for each year, which describes, in detail, by components for the term of the proposed Business Arrangements, annual cash flow expected to be available for debt service. Identify the assumptions on which the estimates are based, e.g. absorption, vacancy rates, operating expenses by category, etc., and any data and rationale used to develop the assumptions. Identify all expected or potential fees and amounts to be charged for development and management services. Identify how and which parties will be subordinate (if applicable) relative to fees and distribution of returns. See Statement of Operating Revenue and Expenditures proforma format located in the appendices.

b) Statement of Operating Sources and Uses of Funds. Include a Statement of Operating Sources and Uses of Funds for each year of the proposed term of the Business Arrangements that identifies the estimated levels of annual cash available after debt service and the estimated value of the improvements at the end of the Business Arrangements term. The cash flow analysis shall indicate the anticipated expenditures, income and sources of revenue on a quarterly basis for the duration of the Business Arrangements and address the repayment of debt. In addition, the Offeror shall identify the assumptions on which the pricing and other market issues are based and local data and rationale for those assumptions. See Statement of Operating Sources and Uses of Funds proforma format in the appendices.

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- c) Development Budget. Include a total Development Budget for the project which describes in detail all hard and soft costs, including but not limited to construction costs (utilizing Davis-Bacon wage determinations), demolition costs, and infrastructure costs, design, engineering, consultant and legal fees, development fees, permit fees, financing transaction fees, construction interest, reserves and commissions. See Development Budget proforma format in the appendices. Provide a PERT chart (Program Evaluation and Review of Techniques) with milestones for the pre-construction/development phase, construction phases, demolition phases, pre-occupancy period, renovation phase, and financial commitments.
- d) Total Project Costs. Include information regarding total project costs relative to the quality of the proposed development and the price per square foot for demolition, renovation, new construction, related improvement costs, and real estate in excess of technical basic requirements and desires (opportunity sites). Submittal shall include but is not limited to:
- i) Hard and soft costs identified in detail.
  - ii) Developer costs separately identified, in detail.
  - iii) Total costs identified and reasonably based on industry standards.
  - iv) Development costs compared to local market development costs.
- e) Development Sources and Uses of Funds. Include a statement of Development Sources and Uses of Funds that describes proposed capital and operation funding by source including but not limited to:
- i) Proposed levels of conventional and/or long-term primary debt.
  - ii) Any perceived difference in value of the conveyed Air Force property and replacement facilities, as well as initiatives/strategy to balance the equity in the transaction.
  - iii) Any other equity contributions.
  - iv) Information with respect to how Offeror proposes to develop the real estate in excess of technical basic requirements and the direct economic benefits that such development will provide to the Air Force. Information shall include, but is not limited to Offeror's intentions with regard to retention, sale, joint venture or other transactions associated with the real estate in excess of technical basic requirements and desires (opportunity sites).
- f) Escrow Accounts. Information describing set up, operation, proposed use and cash flows for the duration of the agreement for the following:
- i) Construction Escrow Account.
  - ii) Security Deposit Account (see **Appendix E-2, Exhibit J** for reference).

**3) VOLUME III - FACILITY CAPABILITY**

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- a) Building Systems. Describe the building systems and utilities infrastructure. At a minimum, address the following:
- i) Energy efficiencies achieved on the project, to include a calculation of estimated utilities consumption.
  - ii) Characteristics of energy efficiency and utility conservation inherent in the proposed design and construction.
  - iii) Details regarding the quality of materials: General descriptions, maintainability, structural features and equipment.
  - iv) Building systems and design lives to include as a minimum, HVAC, roof, emergency generators, sewage lift stations, etc.
- b) Facility Furnishings and Finishes. Provide conceptual plans as necessary to demonstrate the design of the administrative and special facilities. At a minimum, address the following:
- i) Systems furniture concept (including manufacturer's name and product line) highlighting compatibility with facility design.
  - ii) Telecommunications concept highlighting compatibility with facility design.
  - iii) Description of flexibility provided to the tenant after occupancy.
  - iv) Interior architectural styles, materials, finishes, and other relevant characteristics.
  - v) Quality of materials including details of the general description, maintainability, structural features and equipment.
  - vi) Typical office systems furniture layout to illustrate work areas, conferencing, and common use areas for personal interaction.
- c) Facility Capability—Core & Shell. Provide a clear description, including as necessary drawings, plans, maps, renderings (virtual or otherwise), software, or any other material that will allow the Air Force to clearly and easily understand all of the elements of the facility capability and the degree to which the design complies with the requirements of the RFP. At a minimum, address the following:
- i) Site development design (including building types and architectural styles, materials, finishes, force protection, seismic code, and other relevant characteristics).
  - ii) Typical site layout, floor plate, exterior elevations, building sections to demonstrate clear heights (floor to ceiling).
  - iii) Landscaping features.
  - iv) Conceptual utility design approach (exterior).
  - v) Any special features/enhancements.
  - vi) Quality of materials including details of the general description, maintainability, structural features and equipment.

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- d) New Facility Integration with Area B Facilities. Describe the plan to address the consolidation and construction activities at Area B or alternate site, that are incorporated within this Project. At a minimum address the following:
- i) Integration of the consolidated Air Force mission at Area B or alternate site with existing and proposed facilities.
  - ii) Incorporation of enhancements to the overall environment of the community, for example, green space, well-manicured landscaping, street trees, welcoming entries, focal points, and underground utilities.
  - iii) Any reconfiguration of existing vehicular and pedestrian traffic patterns needed for new construction.

**4) VOLUME IV – PROJECT MANAGEMENT**

- a) Project Execution Plan. Provide a detailed plan for the staging/delivery of the project. Include a comprehensive Building Design and Construction Plan that responds to the Air Force's needs which discusses the construction activities of the Project. At a minimum, address the following:
- i) Project construction, scheduling, and phasing (with particular attention paid to the timing of and requirement to relocate and replace existing facilities such as the child development center, consolidated club, command post, building 80, etc.). Include the approach to assuring environmental compliance.
  - ii) Provide Project Schedule describing key elements to include initiation and completion.
  - iii) The nature of completion and performance guarantees to be provided and the resources available to the Offeror to satisfy such guarantees such as construction bonds.
  - iv) Plan to move Air Force employees.
  - v) Plan to control cost growth and requirements creep during construction.
  - vi) Communication/coordination practices and procedures to pre-empt, prevent and/or resolve project issues.
- b) Ownership, Legal Structure and Project Management Team. Describe development entity ownership and legal structure, identifying:
- i) Principals who will participate in the proposed development.
  - ii) Organization structure proposed to own and operate the program, to include the Offeror's project management team.

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- iii) Nature and extent of each principal's interest in the development and any associated liability.
- c) Availability, Allocation and Control of Manpower. Provide a detailed plan of how the manpower needs will be identified, acquired and managed to successfully complete the SAMS project.

**5) PAST PERFORMANCE**

This volume shall be updated for any changes in past performance submitted in Phase I; replacement pages only. The Air Force will use the past performance evaluation from Phase I for this phase, but may update it with information from the Offeror or any other source, as appropriate.

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**PHASE II - SELECTION PROCESS**

Basis for Phase II Selection

The Air Force will select the best overall Offer, based upon an integrated assessment of the evaluation factors provided below. This is a trade off selection conducted in accordance with the process delineated in **Appendix D** - Source Selection Process. An agreement may be established with the Offeror who is deemed responsible, and whose proposal conforms to the solicitation's requirements (to include all stated terms, conditions, representations, certifications, and all other information required by this solicitation), and is judged, based on the evaluation factors and subfactors, to represent the best value to the Air Force. The Air Force seeks to select the Offeror who will give the Air Force the greatest confidence that they will best meet or exceed the requirements affordably. This may result in a selection of a higher rated, higher priced Offeror, where the decision is consistent with the evaluation factors, and the Source Selection Authority (SSA) reasonably determines that the technical superiority and/or overall business approach and/or superior past performance of the higher price Offeror outweighs the cost difference. To arrive at a source selection decision, the SSA will integrate the source selection team's evaluations of the evaluation factors and subfactors (described below). While the Air Force source selection evaluation team and the SSA will strive for maximum objectivity, the source selection process, by its nature, is subjective and, therefore, professional judgment is implicit throughout the entire process. The Air Force reserves the right to cancel this solicitation at any time and make no selection whatsoever.

Rejection of Unrealistic Offers

The Air Force may reject any proposal that is evaluated to be unrealistic in terms of program commitments, including contract terms and conditions, or unrealistically high or low in cost when compared to Air Force estimates, such that the proposal is deemed to reflect an inherent lack of competence or failure to comprehend the complexity and risks of the program.

Correction Potential of Proposals

The Air Force will consider, throughout the evaluation, the "correction potential" of any deficiency or proposal inadequacy. The judgment of such "correction potential" is within the sole discretion of the Air Force. If an aspect of an Offeror's proposal not meeting the Air Force's requirements is not considered correctable, the Offeror may be eliminated.

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**PHASE II EVALUATION FACTORS****INTRODUCTION****Evaluation Factors, Subfactors and Relative Order of Importance**

Selection will be made to the Offeror proposing the most advantageous, best value proposal to the Air Force based upon an integrated assessment of the evaluation factors described below. Factors are listed in descending order of importance. Subfactors are of equal importance.

- a) FACTOR 1: COST TO THE AIR FORCE
- b) FACTOR 2: FINANCIAL STRATEGY
- c) FACTOR 3: FACILITY CAPABILITY
  - i) SUBFACTOR 1 - Building Systems.
  - ii) SUBFACTOR 2 - Facility Finishes and Furnishings.
  - iii) SUBFACTOR 3 - Facility Capability – Core & Shell.
  - iv) SUBFACTOR 4 - Integration with Area B.
- c) FACTOR 4: PROJECT MANAGEMENT
  - i) SUBFACTOR 1 - Availability, Allocation, and Control of Manpower.
  - ii) SUBFACTOR 2 - Project Execution Plan.
- d) FACTOR 5: PROPOSAL RISK.
- e) FACTOR 6: PAST PERFORMANCE (carried forward from Phase I and updated if necessary if additional information becomes available.).

**Assessment Criteria:** Each subfactor in Factors 2 - 4 will be evaluated against the following basic assessment criteria (equal in importance):

**Soundness of approach:** The Offeror's proposal will be assessed in terms of the degree to which the proposal, relating to particular items, is logical, defensible, and consistent with all other parts of the proposal. Additionally, proposal will be assessed as to whether or not all assertions made by the Offeror are supported and thoroughly documented, assumptions are clearly labeled and justified and the proposal assumptions are consistent with current market conditions. Finally, the proposal will be assessed as to whether it provides an effective and efficient method of performing the work.

**Understanding the requirement:** The Offeror's proposal will be assessed in terms of the degree to which the Offeror understands the requirements relating to a par-

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ticular item, as evidenced through compliance with the requirements of the solicitation. The proposal must indicate concise, complete, responses, which are clearly cross-referenced or indexed with the solicitation.

1) FACTOR 1 – COST The Air Force will evaluate the cost to the Government. Goal is to achieve absolute minimum cost to the Air Force.

2) FACTOR 2 - FINANCIAL STRATEGY The requirement is met when Offeror demonstrates an effective financial plan to include:

- i) Ability to bring a complete financing package, including the ability to raise all required equity.
- ii) Financing is subject to commercially reasonable conditions.
- iii) Ability of the proposed business entity to carry out the financial obligations and responsibilities described in the offer.
- iv) Proposed business entity able to function effectively over the term of the agreement.
- v) Workable relationship between timing of private funding commitments and schedule for delivery of Air Force buildings, as well as alternative sources.
- vi) Mitigation of the risk of interest rate fluctuations.
- vii) Cost for Construction. The Air Force will evaluate all required information for reasonableness, realism and completeness.

3) FACTOR 3: FACILITY CAPABILITY

- a) SUBFACTOR 1 – Building Systems. The requirement is met when Offeror demonstrates:
  - i) A sound technical solution with proper consideration to quality features and easy maintainability that meets applicable mission requirements and promotes energy efficiencies for type and style of construction and minimizes lifecycle costs.
  - ii) The degree to which the architectural and structural design integrates or enhances the buildings.
  - iii) Compliance with Appendix A.
- b) SUBFACTOR 2 – Facility Finishes and Furnishings. The requirement is met when Offeror demonstrates:

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- i) A sound technical solution with proper consideration to quality features and easy maintainability that meets applicable mission requirements.
- ii) Aesthetically - pleasing, high quality and durable materials and finishes. For example:
  - In the main lobby granite is more desirable than terrazzo, which is more desirable than ceramic tile.
  - Regarding systems furniture: Identify the name and product line of the systems furniture manufacturer , for example: Knoll-Morrison, Steelcase-Pathways, or Herman Miller Action Office Series 3. (These examples are provided for the purposes of communicating quality level. All manufacturers with product lines of equal or higher quality are acceptable.)
- iii) The degree to which typical office systems furniture layout promotes thoughtfully designed, flexible, ergonomic, and well constructed work stations and compliments hard wall offices and rooms.
- iv) Layout promotes natural light and ventilation for the maximum amount of workstations.
- c) SUBFACTOR 3 – Facility Capability – Core & Shell. The requirement is met when facility master plan demonstrates:
  - i) A sound technical solution with proper consideration to quality features and easy maintainability (For example: A built up roof meets the requirements while standing seam roof exceeds the requirements)
  - ii) Utility distribution system concept consistent with surrounding land uses.
  - iii) Design meets the concepts as defined in the requirements and Air Force Design guides referenced in Appendix A.
  - iv) Aesthetically - pleasing, high quality and durable materials and finishes (For example: granite rates higher than brick, brick is more desirable than concrete).
  - v) Ability to accommodate changing Air Force missions with out having to undertake major alteration projects (for example having a raised floor system throughout the office portions of the facility).
- d) SUBFACTOR 4 – New Facility Integration with Area B Facilities. The requirement is met when Offeror demonstrates:

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- i) Compliance with architectural compatibility requirements.
- ii) Promotion of pedestrian activities and the encouragement of handsome walkways, well placed lighting, and attractive landscaping.
- iii) Minimization of conflicts by separating vehicle traffic from other traffic and minimizing their crossing points.
- iv) Plan to camouflage parking to minimize the visual impact on the overall base development.

**4) FACTOR 4 – PROJECT MANAGEMENT**

a) SUBFACTOR 1 – Availability, Allocation and Control of Manpower.

The requirement is met when Offeror demonstrates an effective plan to assemble and manage the necessary resources to accomplish the project to include: adequate access to human resources necessary to meet project schedule requirements.

b) SUBFACTOR 2 – Project Execution Plan. The requirement is met when Offeror demonstrates:

- i) An effective management plan addressing scheduling, demolition, and environmental compliance.
- ii) Plan to ensure (i) quality control throughout the construction process and satisfactory quality in the completed project and (ii) job-site safety.
- iii) Plan to minimize the number of times Air Force personnel are required to move. One move from area A to area B is best.
- iv) Logical staging and delivery of the project.
- v) A project schedule that identifies all key elements and with 50% of the replacement facilities to be completed by 20 months after contract award, and project completion 18 months thereafter.
- vi) Effective communication/coordination practices and procedures to pre-empt, prevent and/or resolve project issues.

**5) FACTOR 5 – PROPOSAL RISK**

To ensure that only the proposal with the highest probability of success is selected, the financial strategy, project management and facility capability factors will be evaluated for proposal risk. Proposal Risk assesses the weaknesses and associated risks with the Of-

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feror's proposed approach as it relates to accomplishing the requirements of this solicitation. It includes an assessment of the potential for disruption of schedule, increased cost, degradation of performance, and the need for increased Government oversight, as well as the likelihood of unsuccessful contract performance. Evaluators will make an independent judgment of the probability of success, the impact of failure and the Offeror's proposed risk mitigation solutions when assessing proposal risk. Risk will be assessed at the subfactor level, or where there are no subfactors, at the factor level.

**6) FACTOR 6 - PAST PERFORMANCE**

The evaluation from Phase I will be carried forward unchanged unless additional information becomes available. The requirements for past performance are contained in Phase I "Evaluation Factors for Selection".